

# Leave a legacy for generations to come...

Council on Aging of West Florida has established a Planned Giving program to provide supporters the opportunity to make a difference for years to come. This program offers financial and tax advantages for those who participate, while also helping to ensure Council on Aging's services will continue into the future.

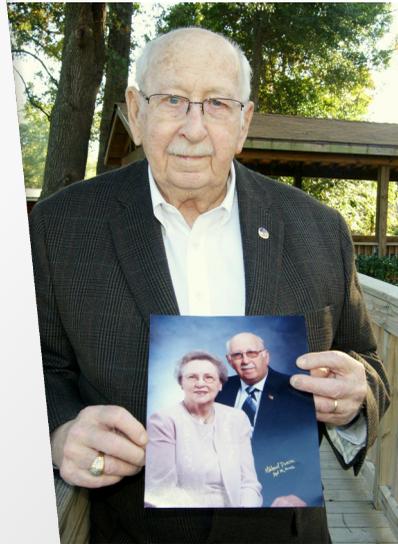
Planned gifts can be made through cash/securities, retirement accounts, life insurance and non-cash assets including property and CDs.

*No matter how you choose to give, your support is greatly appreciated and has a lasting impact on the seniors and caregivers we serve in Escambia and Santa Rosa counties.*



## What can your legacy gift do?

- Provide home-delivered meals for home-bound and frail older adults.
- Provide in-home visits by a trained personal care worker.
- Provide adult day health care services from The Retreat for a senior and respite for family members.
- Provide in-home companionship.
- Pay for an in-home emergency response system.



*"The Retreat was a welcome relief when my wife Jean began to have problems related to Alzheimer's"*

*- Wallace "Glenn" Duncan*



Council on Aging of West Florida's mission is to lead the community in advocacy and services for the aging and those involved in their lives.



Council on Aging of West Florida is a not-for-profit organization and 100% of your donation is retained by this organization. Council on Aging of West Florida is a 501(c)(3) organization, tax-exempt number 59-1373939. Your donation is tax deductible to the extent allowed by law. A COPY OF THE OFFICIAL REGISTRATION AND FINANCIAL INFORMATION MAY BE OBTAINED FROM THE DIVISION OF CONSUMER SERVICES BY CALLING TOLL FREE 1-800-435-7352. IN THE STATE OF FLORIDA, REGISTRATION NUMBER CH201. REGISTRATION DOES NOT IMPLY ENDORSEMENT, APPROVAL, OR RECOMMENDATION BY THE STATE.

Council on Aging of West Florida  
875 Royce Street - Pensacola, FL 32503 - 850.432.1475 - coawfla.org



# PLANNED GIVING



# Planned Giving Options

## CASH OR SECURITIES

**Bequest** - A gift that is included in your will. This can be a specific monetary amount, property or a percentage of your estate.

**Charitable Remainder Trust** - An irrevocable trust that pays a specified annual amount to one or more people for a fixed period of years. At the end of the term of the trust, the remaining trust assets are distributed to Council on Aging of West Florida.

**Charitable Gift Annuities** - An irrevocable transfer of property (eg. cash, securities) in exchange for a contract to pay the donor or the donor's designee an annuity for life.

**Charitable Lead Trust** - An irrevocable trust in which annual payments are given to a charitable organization and the principal reverts to the donor or and his or hers beneficiaries at the end of the trust term.

## RETIREMENT ACCOUNT (IRA, 401K, 403B)

Simply name Council on Aging of West Florida as beneficiary for part or all of your IRA or retirement plan. In return, this could result in estate tax savings or even income tax savings.

## LIFE INSURANCE

Simply name Council on Aging of West Florida as beneficiary of your life insurance policy.

## NON-CASH ASSET

An asset such as insurance policies, CDs, retirement accounts, \*\*real property, etc.

\*\* All gifts of real property are subject to approval by Council on Aging of West Florida Board of Directors.



## Did You Know?

**In Escambia and Santa Rosa counties there are:**

- 97,220 citizens age 60 and older
- 22,370 citizens age 60 and older who live alone
- 12,879 citizens age 60 and older living below 125% of the Poverty Guideline
- 8,665 probable cases of Alzheimer's disease among citizens age 60 and older

**Council on Aging of West Florida** is the only area non-profit that provides a diverse array of programs and services exclusively for the elderly.

- Provides direct services to approximately 2,200 seniors in addition to providing indirect assistance to their family members and caregivers.
- One of fewer than 10 local charities to have earned the designation of Better Business Bureau (BBB) Accredited Charity.
- Administrative costs are less than 9%.

## How Do You Get Started?

- Discuss your options with a legal, financial, or other qualified professional advisors.
- Return this form by mail, complete online at [www.coawfla.org](http://www.coawfla.org) or have your advisor contact Council on Aging of West Florida about your wishes.
- For questions or for more information, please contact Council on Aging of West Florida at (850) 432-1475 or [info@coawfla.org](mailto:info@coawfla.org).

Please send me more information about how I can support seniors in our community through the planned giving program.

My Will  Retirement Account  Life Insurance  Trust  Other:

Name (please print): \_\_\_\_\_

Address: \_\_\_\_\_

City \_\_\_\_\_

State: \_\_\_\_\_

ZIP: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

For more information call Council on Aging of West Florida at 850.432.1475 or email [info@coawfla.org](mailto:info@coawfla.org).

